



USDA Foreign Agricultural Service

# GAIN Report

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## France

## Product Brief

## Sauces

## 2006

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**Report Highlights:**

The French market for sauces, dressings and condiments was valued at 1.6 billion Euros and 415,000 metric tons in 2005. Barbeque sauces, steak sauce, soy sauce, and certain tomato sauces are the best prospects in the French market.

Over the past five years, France's imports of U.S. sauces have declined overall, with the exception of soy sauce.

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Includes PSD Changes: No  
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## Executive Summary

France has been importing more soy sauce and less tomato sauce from the U.S. over the last five years. Barbecue sauces, steak sauce, soy sauce, and, nevertheless, certain tomato sauces are the best prospects in the French market. The French market for sauces, dressings, and condiments was worth about 1.6€ billion and 415,000 metric tons in 2005. Warm sauces and gravies are on a general downward trend, with the exception of a few tomato sauces. Unilever leads the French sauces, dressings, and condiments market and private labels, or store brands, take second place. Sauce manufacturers are changing their packaging and recipes to compete.

## Consumer Trends

U.S. soy sauce, steak sauce, and barbecue sauce are France's most popular U.S. imports, according to a group of French importers. Guacamole sauce sales have generally been successful and stable on the French market. France has been importing guacamole sauce from Mexico for at least the last ten years.

Sauces that are served warm, in both sauce and powder form, face a general downward trend. Combined, tomato and cooking sauces sales fell 2% in value and 0.5% in volume in CY 2005 from CY 2004. The success of sales of certain tomato sauces, such as tomato base in cartons (+6%) and tomato pasta sauce in glass jars (+1%), offset the downfall of cooking sauces over this period.

## Market segments of sauces (defined as tomato and gravies):

	Percent of Sales	% change 04/05
Tomato sauce	75.6%	-1.6%
For pasta	58.2%	-1.3%
Glass jar	45.5%	+0.7%
Can	8.0%	-7.3%
Cooking base	17.4%	-2.7%
Carton	6.6%	+5.8%
Bottle	5.5%	-3.3%
Can	4.9%	-11.9%
Cooking sauce (gravy)	24.4%	-3.8%
Liquid	18.0%	-5.8%
Dehydrated	6.4%	-1.2%
Total:	323 M€	-2.1%

Source: Panel distributors, manufacturers, CY 2005 in Linéaires, n.211, February 2006

## Competition

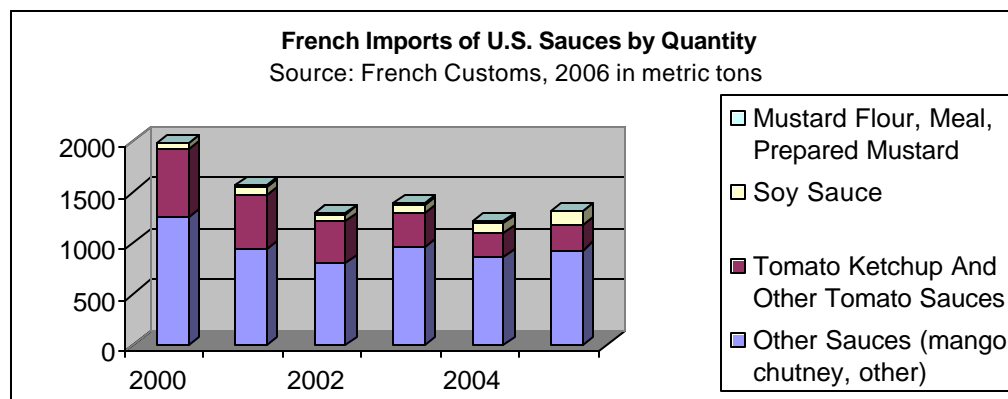
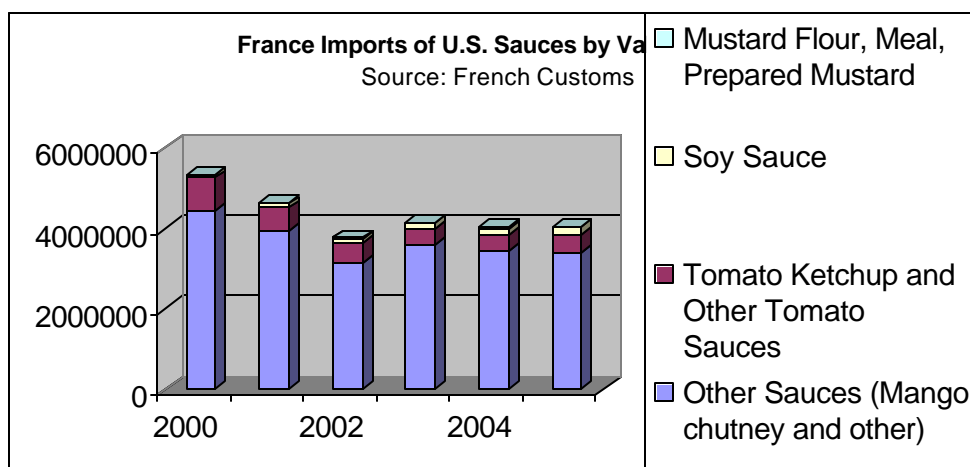
American companies, Mars Inc. and Heinz Co. took 1.9% and 1.6% respectively of the sauces, dressings, and condiments market in 2004. Unilever is the market leader with 29.2% of the market in 2004 with its leading brand Amora, which appears on a range of sauces and seasonings. Private labels, or store brands, have steadily maintained second-place to Unilever over the last five years with about 16% of the market for sauces, dressings, and condiments.

To remain competitive, sauce, dressing, and condiment manufacturers are focusing on repackaging, optimizing traditional recipes, diversifying their products, changing the sizes to compete on price, and introducing new recipes. Barilla France SAS recently introduced bottles of 200 grams and new recipes. Barilla has increased pasta sauce sales 46% over a two-year period of May 2004/2006 with its aggressive television and coupons campaign. Soréal, with 1.1€ million in profits, has repackaged its spreadable sauces and introduced sauces accompanied with vegetables in easy-to-open cups and pods.

Exploring new recipes has been especially important for Heinz, since only 36% of its profits come from its ketchup sales. To reach out to adults, Heinz launched "Variétés" sauces, which are a set of four, with pieces of vegetables, fruits, or aromatic herbs: barbecue sauce with bits of red pepper, exotic sauce with crunchy vegetables and ginger, Indian sauce with curry and pineapple bits, and Italian sauce with chopped olives.

### French Imports of U.S. Sauces

Over the last five years, France's imports of U.S. sauces have declined overall, with the exception of U.S. soy sauce. French imports of U.S. soy sauce rose 20% by quantity and 14% by value from CY 2004 to CY 2005. These imports have more than doubled in quantity and volume since CY 2000. French imports of U.S. tomato sauces for CY 2005, however, dropped to about a half of what they were in quantity and value in CY 2000. Despite this trend, French imports of U.S. tomato sauces rose 13% by quantity and 16% from CY 2004 to CY 2005.



## Distribution

Sauces, dressings, and condiments tend to be consumed off-trade more than on-trade, as 295,000 metric tons of these products were distributed off-trade in 2005 and 119,000 metric tons were distributed on-trade for the same year.<sup>1</sup> Please see our 2005 GAIN Retail Sector Report for more details.

## Tariff Information

HS Code	Description	Contractual Provisions
21031000	Soy Sauce	7.7%
21032000	Tomato ketchup and other tomato sauces	10.2%
21033010	Mustard flour	Exempt
21033090	Prepared mustard	9%
21039010	Mango chutney	Exempt
21039090	Other sauces	7.7%
22090011	Wine vinegar less than 2 liters	6.4€/hl
22090019	Wine vinegar more than 2 liters	4.8€/hl
22090091	Other vinegars less than 2 liters	5.12€/hl
22090099	Other vinegars more than 2 liters	3.84€/hl

Source: Official Journal of the European Union L 286, 48<sup>th</sup> year, October 28, 2005

## French Importers

AFIS SARL (salad dressing)  
 Contact: Monia Sabathier  
 5 rue Jean Jaurés  
 Sully Sur Loire 45600  
 Phone: 011(33) 2.38.36.22.40  
 Fax: 011(33) 2.38.36.27.75  
 Email: [afis.intl@wanadoo.fr](mailto:afis.intl@wanadoo.fr)

BUR DISTRIBUTION (salad dressing + sauces)  
 Contact: César Barrachin  
 Le Mesnil le Roi  
 Maisons-Lafitte 78600  
 Phone: 011(33) 1.30.22.91.91  
 Fax: 011(33) 1 34 74 2373  
[direction.commerciale@ericbur.fr](mailto:direction.commerciale@ericbur.fr)

For additional French importers of sauces and salad dressings, please contact us at [agparis@usda.gov](mailto:agparis@usda.gov)

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<sup>1</sup> Euromonitor, 2006.